

Guidelines for Procurement and Expenditure/Match Documentation

It is important to remember that all expenditures must be: *allowable*, *allocable* and *reasonable* to ensure the purchase is perceived as a good use of taxpayer dollars and in compliance with state and federal guidelines. Listed below are the Procurement Guidelines and Rules for Expenditure and Match Documentation.

GEAR UP Procurement Guidelines	
Topic	Points to Consider
Pre-approval	<ul style="list-style-type: none"> ▪ Procurement purchases must be pre-approved. <ul style="list-style-type: none"> ○ “Goods” (example: technology, furniture, equipment). ○ “Services” (example: consultants, contracts). ○ Gift Cards <i>are not allowable</i> per Iowa Code. ○ Food purchases are only acceptable if necessary for the function of an event. Such purchases are not allowed during regular school meetings in which food would not normally be provided. ▪ Send pre-approval request(s) and supporting documentation to the GEAR UP Project Coordinator via email
State Procurement Rules	<ul style="list-style-type: none"> ▪ Goods/Services under \$1,500: <ul style="list-style-type: none"> ○ Competitive bids are not required when procuring goods up to \$1,500 ○ Schools are still required to follow district purchasing policies <ul style="list-style-type: none"> ▪ If the district policy requires bids on items under \$1,500, school must comply with that policy. Those bids do not need to be sent to GEAR UP Iowa for approval per State guidelines. ▪ Goods/Services over \$1,500 and under \$10,000: <ul style="list-style-type: none"> ○ Schools will need to seek informal 3 bids or quotes from vendors. <ul style="list-style-type: none"> ▪ School may contact vendors directly and request a quote or ▪ School may be able to find pricing information for goods online. ○ Bids need to compare like items to ensure accuracy ▪ Goods/Services over \$10,000 and under \$50,000: <ul style="list-style-type: none"> ○ Follow the same informal bid process as listed above ○ GEAR UP Iowa may require the school to select the lowest bid depending on the item(s). ▪ Goods/Services over \$50,000: <ul style="list-style-type: none"> ○ Items over this amount will need to adhere to a formal bid process. ○ Schools must seek 3 bids ○ GEAR UP Iowa Accounting will select the vendor to award.
Exceptions	<ul style="list-style-type: none"> ▪ Common exceptions to the Procurement Policy include: <ul style="list-style-type: none"> ○ The School/District holds an existing contract with the vendor ○ There is only one option for a vendor. ○ Other situations may apply. ▪ Attach explanation of the exception to the quote. ▪ Contact GEAR UP Project Coordinator to ask if the situation warrants an exception.

For information on the State of Iowa Procurement rules, see Chapter 117 of the Iowa Administrative Code:

<https://www.legis.iowa.gov/law/administrativeRules/rules?agency=11&chapter=117&pubDate=09-25-2013>

**** Schools must adhere to district purchasing policies in any instance where the district policy is stricter than GEAR UP Iowa purchasing requirements. ****

**** Under NO circumstances may Federal Funds be used to pay for entertainment to include amusement, diversion or social activities. ****
